CUSTOMIZING YOUR SCHOOL'S CAL GRANT ROSTER
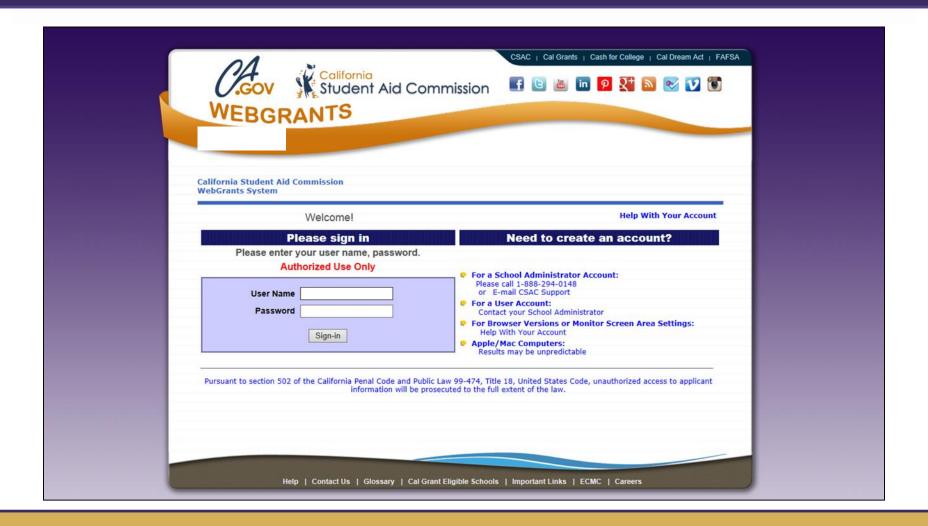

PRESENTED BY:
CALIFORNIA STUDENT AID COMMISSION

IN TODAY'S WEBINAR…

- Phones will be muted to eliminate background noise

- All questions can be typed in the Q&A panel to the right, staff is available to answer your questions

- As you exit today's webinar, you'll be prompted to complete a brief survey, your response is greatly appreciated

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Roster Format Title		
Roster Format	New Unpaid Comp CGB	**Preferred** ○ Yes ● No

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Select Data Elements and Column Order

- "Data Elements Available" contains a list of all available roster elements.
- Click and highlight each data element that you wish to display on your roster.
- For multiple selections, click on the first element and then hold down the CTRL key to select additional elements.
- Once items are highlighted, click on "Add Data Element(s)".
- The "Data Elements Selected" box will reflect the column headings that will display on your roster format.
- "Remove Data Element(s)" will delete the selected elements from your selection list.
- Use the "Move Up" and "Move Down" to order the individual column headings for display.
- After selecting data elements, click "Continue" to choose sort options.

Data Elements Available

Data Elements Selected

Add Data Element(s)

Remove Data Element(s)

Move Up

Move Down

SSN
DOB
Grant ID
Cycle ID
Housing Code
Dep Status
New / Renewal
EL Code
CSAC Budget
EFC

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Select Terms

- ➡ Select the term(s) you wish to display
- ➡ Selecting only one(1) term will allow users to sort records by term-specific data elements
- ➡ After selecting term(s), click "Continue" to choose sort options

☐ **Fall**   ☐ **Winter**   ☐ **Spring**   ☐ **Summer**

[Continue]

Define Sort Order Preferences

➡ Click drop down boxes to choose elements for sort.

First Sort Preference	Roster Section ▾	Ascending ▾
Second Sort Preference	Last Name ▾	Ascending ▾
Third Sort Preference	First Name ▾	Ascending ▾
Fourth Sort Preference	Middle Initial ▾	Ascending ▾
Fifth Sort Preference	SSN ▾	Ascending ▾
Sixth Sort Preference	▾	Ascending ▾

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Define Selection Criteria

▶ Check boxes below to limit the records you wish to display.

▶ A checked box means that only records with those values will be included. (*If no box or every box is checked in a category, you will see all those records for your school.*)

Cycle ID	☐ E1	☐ E2	☐ C1 ☐ C2
Award Type	☐ Tuition/Fees	☐ Access	☐ Books & Supplies
Housing Code	☐ On Campus (1)	☐ Off Campus (2)	☐ With Parents (3)
Dependency Status	☐ Dependent	☐ Independent	
EL (Education Level)	☐ 1	☐ 2	☐ 3 ☐ 4 ☐ 5+

EL Status
☐ Verification Not Required (1)   ☐ Not Paid, Verif Required (2)
☐ Verified As Reported (3)   ☐ Verified with Change (4)
☐ Unable to Verify (5)   ☐ Paid, Verification Required (6)

New/Renewal Students	☐ New	☐ Renewal	
Program Code	☐ A	☐ B	☐ C ☐ T
Section	☑ Eligible	☑ CC Reserve	☑ Ineligible ☐ Not In Attendance
Extra Eligibility	☐ TCP	☐ 5th Year	☐ Not TCP nor 5th Year

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E1 On Hold Status	☐ Verification Required	☐ Verification Completed
	☐ Verification Not Required	
E2 On Hold Status	☐ Waiting for G6 Return	☐ Requires Verification by School
	☐ School Verified Eligible	☐ School Verified Ineligible
Dream App Flag	☐ Dream App Student	☐ Non Dream App Student
Asset Hold Flag	☐ On Hold	☐ Release from Hold
	☐ Not On Hold	
Payment Status	☐ Paid	☐ Unpaid
Top 2% Cal B Entitlement Awards	☐ Yes	☐ No

Adj Reason Codes

☐ AF	☐ AH	☐ AT	☐ FT	☐ GR
☐ HT	☐ IA	☐ IB	☐ IC	☐ IP
☐ LA	☐ LD	☐ NP	☐ NS	☐ OF
☐ OH	☐ OT	☐ RF	☐ RH	☐ RT
☐ SH	☐ SL	☐ SR	☐ TT	

Annual Need From $ [____] To $ [____]

Annual Award Amount From $ [____] To $ [____]

Remaining Eligibility From [____] % To [____] %

Forecast Eligibility From [____] % To [____] %

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THANK YOU!

California Student Aid Commission

Institutional Support

(888) 294-0153

schoolsupport@csac.ca.gov